

AMENDMENTS TO THE CLAIMS

1 (Original). A method for interfacing a client with a client relationship management (RM) account database, wherein the client RM account database includes an entry for the client, wherein the entry for the client includes a plurality of fields of data, the method comprising the steps of: (1) maintaining a client account entry in a RM database, the client account entry including a plurality of data fields; (2) receiving a request from the client to view the client account entry; (3) allowing the client to view a sub-set of the data fields.

2 (Original). The method according to claim 1, further comprising the step of: (4) increasing a level of permission marketing associated with the client.

3 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) providing the client with one or more of the following: a description of product offerings; research information; and contact information.

4 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) providing the client with information specifically relevant to the client.

5 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) providing the client with one or more of the following: research information specifically relevant to the client; and summary transaction information related specifically to the client.

6 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) receiving feedback from the client.

7 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) receiving feedback from the client related to a line of business.

8 (Original). The method according to claim 2, wherein step (4) comprises the step of: (a) maintaining an interactive relationship with the client.

9 (Withdrawn). A method for interfacing a client with multiple client relationship management (RM) account databases, wherein each client RM account database includes a client entry, wherein each client entry includes a plurality of fields of data, the method comprising the steps of: (1) coupling a client to a first RM account database; (2) coupling the client to a second RM account database while the client is connected to the first RM account database; (2) providing the client with a display of a sub-set of fields of a client account entry in the first RM account database and of a client account entry in the second RM account database.

10 (Original). The method according to claim 1, further comprising the step of: (4) increasing a level of permission marketing associated with the client.

11 (Withdrawn). A method for increasing a level of permission marketing associated with the client, comprising the steps of.

12 (Withdrawn). A system for increasing a level of permission marketing associated with the client, comprising: a research module; a knowledge base module; a coverage module; a project module; a deal module; a WIP module; an activity module; a bank review module; and a communication module.

13 (new). A method of exchanging information between a client and at least one of a plurality of service providers, comprising:

defining a plurality of client objectives,

defining a plurality of permissioning rules associated with each of the service providers in accordance with the defined client objectives,

organizing information exchanged between the client and at least one of the plurality of service providers in accordance with the permissioning rules, and

displaying information exchanged between the client and at least one of the plurality of service providers in accordance with the permissioning rules,

whereby information exchanged between the client and the service provider is organized in accordance with permissioning rules reflecting client objectives.

14 (new). The method of claim 13 wherein the step of defining a plurality of permissioning rules comprises defining a plurality of permissioning rules in accordance with at least one product associated with the service provider.

15 (new). The method of claim 13 wherein the step of defining a plurality of permissioning rules comprises defining a plurality of permissioning rules in accordance with at least one person associated with the service provider.

16 (new). The method of claim 13 wherein the step of defining a plurality of permissioning rules comprises defining a plurality of permissioning rules in accordance with at least one project associated with the service provider.

17 (new). The method of claim 13 wherein the step of defining a plurality of permissioning rules comprises defining a plurality of permissioning rules in accordance with at least one service associated with the service provider.

18 (new). A method of exchanging information between a client and at least one of a plurality of CRM systems, the at least one of the plurality of CRM systems being associated with a service provider CRM system, the method comprising:

defining a plurality of client objectives,

defining, via a client portal, a plurality of permissioning rules associated with the service provider in accordance with the defined client objectives,

organizing information exchanged between the client and the service provider in accordance with the permissioning rules, and

displaying, via a client portal, the information exchanged between the client and the service provider in accordance with the permissioning rules,

whereby information exchanged between the client and the service provider is organized in accordance with permissioning rules reflecting client objectives.

19 (new). The method of claim 18 wherein the step of defining a plurality of permissioning rules comprises the step of introducing into a client portal a field associated with a service provider CRM system.

20 (new). The method of claim 18 wherein the step of displaying, via a client portal, the information exchanged between the client and the service provider in accordance with the permissioning rules comprises limiting the displayed information to information which the client wishes the service provider to observe.